

Attached Documents Report

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Overview

The Attached Documents report gives you visibility into documents attached at the schedule level. Use it to confirm that every schedule has required documentation on file and to conduct period-based reviews such as quarterly or annual audits.

Note: This report can be scheduled by clicking the 'Schedule this Report' option at the bottom of the screen and following the standard scheduling process.

Location & Access

The Attached Documents report is located under the **Reporting** → **Administrative** tab. The following roles can view and run the report:

- LAMStaff
- Power Users

By default, the access is restricted.

Report Parameters

Use the filters below to narrow results. Running the report with no filters applied returns all records.

Reports

Scheduled

My reports

Client reports

Accounting

Administrative

Uncategorized

Attached Documents

Schedule Number:

Lease Start Date:

To

Date Schedule Entered:

To

*Required

Generate Report (PDF)

Export

☐ Schedule this Report

Parameter	Type	Description
Schedule Number	Text/Search	Filter by a specific schedule number. Supports the wildcard character (*) for partial or pattern-based matches.
Lease Start Date	Date Range	Filter by lease start date. Useful for quarterly or annual period reviews.
Date Schedule Entered	Date Range	Filter by the date the schedule was entered into the system.

Note: Date range parameters have no default value. Leaving them blank returns all records regardless of date.

Report Output

The report returns one row per document attached to a schedule. A schedule with multiple attachments will appear on multiple rows. Schedules with no attachments are excluded from results.

Attached Documents Report				
Schedule Number	Document Name	Document Type	Document Date	Comments
100yr Lease Annual	59628	Accounting Classification Analysis	12/22/2022	NOTE: Formal classification review not performed
100yr Lease Annual	100yr Lease Annual	Asset Manifest	12/22/2022	
100yr Lease Annual	100yr Lease Annual	Deal Summary	08/31/2023	
100yr Lease Annual	100yr Lease Annual	Lease Schedule	12/22/2022	

Column	Description
Schedule Number	The identifier of the schedule the document is attached to.
Document Name	The name of the attached document.
Document Type	The type or category of the attached document.
Document Date	The date manually entered by the user when the document was attached.
Comments	Optional comments entered by the user at the time of attachment.

Exporting Results

Report results can be exported in the following formats:

- Excel (.xlsx)
- PDF (.pdf)

After running the report, select the **xlsx** or **PDF** button to download results in your preferred format.